



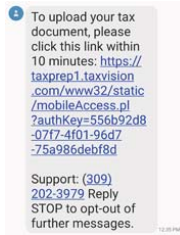
Client Instructions for TXT to Upload Documents and TXT to Sign 8879

Your Tax Preparer has or will be texting you a request to either upload tax documents or electronically sign the 8879. These instructions will guide you through the process. Please note for security purposes you will need to start the process within 10 mins of receiving the text or it will expire and require your tax preparer to resend the text again.

TXT to Upload Documents

Before you Start: Please make sure you have **ALL** your printed documents ready prior to starting the process.

Step 1: Once you have received the following text message click the link to proceed.

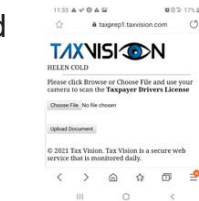


Step 2: Once you clicked the link the following webpage will load.

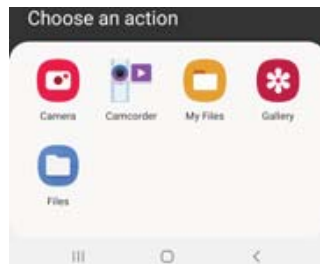
From this page you can select the pre-defined document type(s) or Select **“Upload A Document”** if your document type is different than listed.



Step 3: Once you have selected a document type, then click the **“Choose File”**.



Step 4: From here you can either select a file already saved on your phone or use your camera and take a picture of the document.

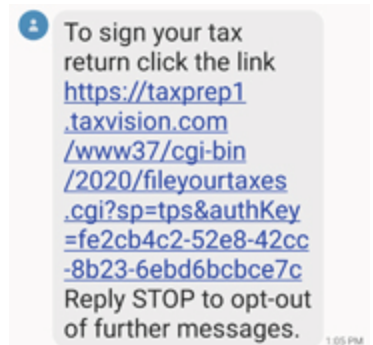


Step 5: Notice a file was created for the picture you just taken. Next, hit the **“Upload Document”** button to upload document. Once you receive the **“Upload Success”** message your done or you can upload additional documents.



TXT to Sign 8879

Step 1: Once you have received the following text message click the link to proceed.



Step 2: Simply type your name in the signature box and click the **“Save and Continue”** button.

Congratulations you're done!

Thank you, you signed the document

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